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automotive FLEET

THE [illegible]MENT MAGAZINE FOR CAR AN[illegible]FLEET OPERATORS

updates on: amc/ national-account sources/ recordkeeping requirements

...rostar arrives!

MAY 1985 VOL. 24, NO. 7

automotive FLEET®

THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS

Influencing the management of 4,584,000 cars and 1,970,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

FEATURES

Update on National Account Programs p. 29

Jeep/Renault: A Fleet For All Reasons p. 35

Ford's '86 Aerostar: "Tough Durability" in an Aerodynamic Package p. 63

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On our cover: Ford fleet execs Bill Willis and Lou Polsinelli stand beside (and behind) their new Aerostar van. As the story on page 63 attests, Ford is hoping that "the last shall be the first."

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Calendar

MAY

6-9 — National Association of Fleet Administrators Automotive Systems and Maintenance Technologies course, Hyatt Cherry Hill, Cherry Hill, NJ.

9-11 — Congress of Automotive Repair and Service, first annual trade show and conference, Hyatt Regency Hotel, New Orleans, LA.

22-24 — Leasemark Lease Management Training Course, Marriott Main Line, Philadelphia, PA.

30-June 2 — Automotive Fleet and Leasing Association Convention Westin Copley Plaza, Boston, MA.

JUNE

2-4 — 1985 Truck Blue Book Used-Truck Seminar, Ramada Renaissance Hotel, Atlanta, GA.

2-5 — National Association of Fleet Administrators 28th Annual Conference, Sheraton-Boston, Boston, MA.

6-7 — Leasing: Techniques and Analysis I, course offered by the American Management Association, Chicago, IL; for information on courses in other cities call (518) 891-0065.

6-7 — Buzz Doering Automobile Leasing Seminar, O'Hare Marriott, Chicago, IL; for information on seminars in other cities call (414) 367-6700.

16-19 —Electric Utility Fleet Members Conference, Williamsburg, VA.

JULY

21-26 — Wharton Certified Fleet Manager Program, Course One, workshop developed by Wharton School of the University of Pennsylvania and the NAFA Foundation, Inc., Philadelphia, PA.

Gas Prices

UNLEADED

City	Cost Per Gallon Unleaded Full-Serve	Self-Serve
San Francisco, CA	149.9	117.8
Jacksonville, FL	133.9	110.6
La Salle, IL	147.4	120.4
Louisville, KY	145.2	116.9
Minneapolis, MN	153.9	119.2
Niagara Falls, NY	127.4	117.9
Dayton, OH	128.9	111.9
Tulsa, OK	122.4	107.2
Philadelphia, PA	132.4	110.2
Knoxville, TN	139.6	112.6
Beaumont, TX	135.4	106.4
Arlington, VA	152.9	115.2
Bennington, VT	132.4	114.9
Madison, WI	146.4	118.4
Cheyenné, WY	123.9	113.4

Survey conducted during the first five working days of April, 1985.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

New Entries To Liven Up Compact Pickup Market

The '84 compact pickup arena appeared rather ho-hum after the furious new-model activity of the past several years. Basically, two clearly defined subsegments — the "new generation," represented by the U.S.-built Chevrolet S-10/GMC S-15 and Ford Ranger and the Japanese Toyota truck, and the "old generation" Nissan, Mazda, Mitsubishi (and Dodge D-50), and Isuzu pickups — vied for sales. However, during the next 12 months, the situation is expected to change as the "new generation" forces growth with the addition of the 1985½ Mazda and '86 Jeep Comanche pickups. Early in '86, Chrysler is expected to introduce its mid-size N-truck and an '87 model. The "old generation" will remain with the Nissan (as the highest volume entry), Mitsubishi, and Isuzu pickups.

In '84, there were five high-volume competitors in this market; by '87, there will be seven or eight depending on the strategy chosen by Isuzu. The new entries will be stronger than ever, and, at least from a product standpoint, will give Ford and Chevrolet a run for their money in terms of sales volumes. *The Power Forecast* projects that the overall compact-pickup market will remain robust but that the days of dramatic annual sales increases are over.

What will keep volumes at these robust levels? Some of the demand will be producer-driven as new, better products are introduced. Substantial volume will come from growing commercial use of compact pickups. As this segment has evolved, most manufacturers correctly assumed that the compact pickup would be used primarily for personal transportation. Due to its convenient size, low operating cost, and relatively low sales price, the compact pickup often was purchased instead of a lower priced automobile.

Compact Pickup Sales Forecast

	1984 (000)	1987 (000)
Chevrolet S-10/ GMC S-15	231	224
Ford Ranger	221	195
Jeep Comanche (Jeep pickup, Scrambler	6	52
Chrysler N-Truck	—	90
Toyota	245	260
Dodge Ram 50	51	35
Nissan	204	175
Mazda	119	148
Mitsubishi	15	14
Isuzu	39	35
Total	**1,131**	**1,228**

Source: *The Power Forecast*

Over time, the compact became not only a low-cost, high-utility method of personal transportation, pulling volume away from low-priced cars, but also a vehicle which could be used for personal expression. Japanese makes — especially Toyota 4x4s — have been modified to the desires of the young people driving the vehicles. This anomaly could have led many to write off the compact as merely a toy — a mini-truck not worthy of serious consideration or commercial use.

However, recent research conducted by J.D. Power & Associates indicates commercial and business users are beginning to shift from full-size trucks to compact pickups. In many cases, the user does not require the larger size and higher capacity of the conventional pickups; the smaller size, adequate capacity, and lower maintenance cost of the compact pickups are attractive to this growing number of buyers.

Those are the positives surrounding the compact-pickup market — better, more contemporary products and greater acceptance for commercial applications. But there are some dynamics which do constrain the overall volume potential of the segment. First, the extremely popular derivative of the compact pickup — the sport/utility 4x4 — has certainly taken volume away from the pickup. In the past, a buyer may have been able to get most of the utility from installing a "camper shell" on his pickup bed. Now, he can get all the comforts of home in a package with more finesse. The second dynamic is the evolution of the minivan market, which is expected to grow rapidly over the next three years. The multiple functionality attributes of minivans will certainly draw a good number of potential compact pickup (and sport/utility 4x4) buyers away from those more traditional markets. The third dynamic is that increased small and low-priced car competition will likely moderate transaction prices in small-car classes in the next few years. It may become a battle between compact pickups and small cars as to which vehicle type can provide the lowest cost new transportation.

Still, a healthy market, overall, for compact pickups is projected. This "healthy" market, however, is becoming much more competitive in terms of product execution and

"Price competition likely will become an important way of life..."

volume expectation. Thus, price competition likely will become an important way of life for the competitors here. Mazda built an extremely respectable sales base using price, good value for the money, and aggressive advertising as merchandising tools. In essence, it bought share for an old product when excess capacity was freed up by the cancellation of the Ford Courier (a subtle derivation of the Mazda B-2000). This strategy has been extremely successful, and Mazda is now a major force in the market. When Mazda announces its new pickup this spring, it will be interesting to see how this strategy changes.

This leaves Nissan, Mitsubishi, and Isuzu to compete with "old generation" products largely on the basis of price and advertising. Nissan perhaps is the most exposed; since it has made a huge investment in its Smyrna, Tennessee, assembly plant for Nissan Motor Manufacturing Corp., Nissan is forced to go to almost any length to keep the facility at capacity. Nissan has stated that its objective is to keep Smyrna at capacity — 140,000-150,000 trucks annually — while allowing its Kyushu truck plant to provide volume flexibility. This leaves Nissan with a volume objective of about 175,000-200,000 trucks. With its relatively old product, Nissan will be forced to compete on the basis of price and aggressive merchandising and advertising until a new product is introduced.

Specific projections by manufacturer are: **1985 — Toyota:** Coming off a year when it has achieved the number-one position in compact-truck sales, Toyota introduces minor, but important, changes for '85. Toyota adds a 5,000-lb. trailer-towing package and a 2,500-lb. heavy-duty payload package as options. These moves make the Toyota pickup more than competitive with domestic and other Japanese manufacturers' products. The next hurdle for Toyota to clear is providing much needed extra power for its engines. Toyota has expanded the application of the direct-port fuel-injection four-cylinder and a 135-horsepower turbocharged four-cylinder will likely be introduced as early as '85½. This turbo will not only be the only compact-truck (gasoline) turbocharged engine but also will provide the highest specific horsepower of any competing compact-truck powerplant.

Ford Ranger: Ford has improved its truck powertrains for '85 by adding direct-port fuel-injection to the 2.3-liter OHC I-4 on the Ranger. This is an important move in Ford gaining a substantial competitive advantage over the S-10/S-15. Also, a fully featured sport truck, the STX, was added to the Ranger lineup to provide strong facing competition to the Toyota SR-5 and Nissan Sport Truck.

1985½ — Mazda: Mazda announced its all-new compact pickup

COMPACT-TRUCK SEGMENT

MFR. \ MODEL YEAR	1985	1986	1987
Chevrolet S-10/ GMC S-15	Add 2.5L I4 Tech IV engine		Possible Facelift
Chrysler		All-new N-truck Mid-size 4x2 only 2.2L I4/3.0L V6	Add 4x4
Ford Ranger	Add 2.3L OHC EFI New STX Model	Add Extended Cab 2.9L V6 EFI	
Jeep		All-new Comanche 4x2/4x4 Long-bed 2.5-L I4/2.8L V6	Add Short bed
Dodge Ram 50 (Mitsubishi)			
Isuzu P'Up			
Mazda	All-new 4x2 Regular Cab 2.0L I4	Add 4x4 Extended Cab Possible 2.6L I4 (from Mitsubishi)	
Mitsubishi			Possible All-new 4x2 and 4x4 2.2L I4/3.0L V6 (?)
Nissan	New King Cab Sport Truck New Smooth-side Box	All-new 4x2/4x4 2.4L I4/3.0L V6	
Toyota	Add 5,000-lb. Towing Pkg. Add Turbo I4		Add V6 (?)

COMPACT PICKUP TRUCK SPECIFICATIONS

COMPACT PICKUP TRUCKS	1985 CHEVROLET S-10	1985 FORD RANGER	1985 TOYOTA PICKUP	1985 NISSAN PICKUP	1985½ MAZDA PICKUP	1986 JEEP COMANCHE	1986½ CHRYSLER M-TRUCK
DIMENSIONS							
• Overall Length (SWB/LWB)	178/194	176/189	175/184	172/187	183/196	194	186/204
• Wheelbase (SWB/LWB)	108/118	108/114	103/112	101/111	108/118	120	112/124
• Overall Width	65	67	67	63	66	66	68
• Overal Height (4x2)	60	64	61	62	62	65	63
• Width Between Rear Wheelhouses	40	40	41	40	43	44	45
• Box Length	73/89	72/84	75/86	72/86	TBD	89	78/97
POWERTRAIN							
• Base/High Volume	2.5L I4	2.3L I4 EFI	2.4L I4	2.4L I4	2.0L I4	2.5L I4	2.2L I4
• Maximum	2.8L V6	2.8L V6	2.4L I4 EFI	—	2.6L I4*	2.8L V6	3.9L V6
BODY STYLES/TYPES							
• 4x2	X	X	X	X	X	X	X
• 4x4	X	X	X	X	1986½	X	1987½
• Regular Cab	X	X	X	X	X	X	X
• Extended Cab	X	1986	X	X	1986½	NA	NA
• Long Wheelbase	X	X	X	X	X	X	X
• Short Wheelbase	X	X	X	X	X	1987	X
• Double Wall Bed	X	X	Opt.	X	X	X	X
• 4x4 Front Suspension	IND	Twin I-Beam	Non-beam	IND	IND (?)	QUADRALINK	IND (?)

(?) Tentative
* 1986½–1987

Source: The Power Newsletter

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"Chrysler's N-truck in '86..."

in mid-Fedruary. This vehicle is a much needed change which will allow Mazda more flexibility in its pricing and merchandising strategies. Initially, it is expected that Mazda will introduce a Regular Cab 4x2 only with a model lineup similar to the present B-2000. This will enable Mazda to implement a pricing strategy similar to its present strategy if it chooses. However, the strategy likely will see premium pricing of higher series models, leaving the price leader as very low-volume model (presently, the low-price Mazda represents substantial volume). The styling of the new truck is expected to be relatively aerodynamic for a truck product, similar in theme to newer entries like the 626. Within the first year after introduction of its Regular Cab 4x2, it is expected that Mazda may introduce 4x4 and Extended Cab models to its truck line.

If Mazda has been able to generate such substantial volumes with an incomplete lineup, it should be able to really push Toyota and Nissan when it has a full lineup. The only negative which may impact the Mazda is its relatively small 2.0-liter, four-cylinder, base engine. There is some word around the industry that Mazda will pick up the Mitsubishi 2.6-liter, four-cylinder as a more powerful engine for its truck. It could be inferred that Mazda will acquire Mitsubishi capacity as Chrylser phases out the Mitsubishi 2.6-liter.

1986 — Jeep Comanche: The Jeep Comanche is expected to be introduced in the fall of '85 as an '86 model. This pickup derivative of the extremely successful Cherokee and Wagoneer will be a welcome addition to the Jeep truck and sport/utility lineup. The Comanche will be built in Toledo along with the Cherokee and Wagoneer. It is thought that the initial Comanche volumes will be in the 45,000-55,000 unit-per-year range. The vehicle will be available in both 4x2 and 4x4 versions — a departure from the previous heavy emphasis on 4x4-only products from Jeep. Initially, the Comanche is expected to be available only in a long-wheelbase, long-bed version, with a short-bed version added a year later. Given the success of the Cherokee and Wagoneer, the Comanche should be very well received if its price is competitive with the S-10 and Ranger. AMC may be in the welcome dilemma of whether to flex more Comanches, Cherokees, or Wagoneers to fill the capacity of Toledo.

Ford Ranger: Ford is expected to add a Super Cab version to the Ranger truck line. This bodystyle is expected to prevent migration from the Ranger line to competitors such as the S-10 and the Nissan King Cab. Also, in '86, Ford likely will add an optional 135-horsepower, 2.9-liter V-6 with direct-port fuel injection and an innovative electrically controlled 4x4 transfer case which should provide an advantage on the current leader — the S-10 4x4.

1986½ — Chrysler N-truck: The N-truck is expected to be introduced during the first quarter of '86 as an '87 model. The N-truck is substantially larger than the compact pickups, but smaller than conventional pickups, and could be classified as a mid-size truck. One of the major objectives for the truck was to have the capacity to carry a 4x8-foot sheet of plywood flat on the cargo bed floor. It appears the N-truck will not meet that critical objective; the width between the rear wheelhouses is expected to about 45 inches rather than the 45-plus inches needed to allow a 4x8 sheet to lay flat. From a box-length standpoint, the N-truck is expected to have a 96-inch-plus box length for its long-bed version. This makes the N-truck the only "compact" with a cargo box fully eight feet long.

Initially, the N-truck is expected to be available as a regular Cab only. Both short- and long-wheelbase models will be available, and, within the first year, a 4x4 is expected. Interestingly, it does not appear that Chrysler is planning to introduce an extended-cab version of the N-truck. For the company that pioneered the Maxi Cab, this is somewhat of a surprise.

The primary engines for the N-truck are expected to be the 2.2-liter four-cylinder and the new Chrysler 3.9-liter V-6. Indications

are that the V-6 will be tuned for heavier duty applications with a relatively moderate power output of around 120-130 horsepower.

Nissan: Nissan is expected to replace its aging compact truck with an all-new product in early '86. This product is critical to the long-term success of Nissan's venture into United States assembly. Until the new truck is launched, Nissan will be the only high-volume manufacturer with an "old generation" product. Since this old product will be tougher to move, Nissan must compete with lower prices and aggressive and expensive merchandising and advertising campaigns. Recently, Nissan has been pushing its truck with costly 8.8-percent financing programs.

Even though Nissan continues to improve its present truck — with a smooth-side box and new King Cab Sport Truck in '85 — it cannot become fully competitive until its new product is introduced in '86½. When the new Nissan is introduced, it is expected to be fully competitive with the best of the compact pickups. Expect Nissan to have all models available: Regular Cab, King Cab, Short Bed, Long Bed, 4x2 and 4x4. Additionally, Nissan is expected to offer the excellent 3.0-liter V-6 in the vehicle. The Nissan 3.0-liter V-6 likely will provide a competitive advantage for the truck line over other V-6 competition.

1987 and Later — In '87 or '88, a new Mitsubishi pickup is expected. It likely would be fully competitive with the other new-generation compact pickups and may logically have the new Nissan as its image target. Mitsubishi could be expected to add its new V-6 engine to the truck line once it has satisfied the volume requirements of Chrysler (for the T-115 Minivans) and its own higher-series passenger cars (like the Galant).

If all this aggressive powertrain implementation happens as expected within the Japanese competition, it is conceivable that Toyota would be at a competitive disadvantage to its high-volume competition — especially Nissan. A good question is what will Toyota do to protect its position as the number-one compact pickup and to provide more power output? Will it turbocharge the 4-cylinder (rumored for '85½ or '86), or will it add an all-new V-6 (rumored for '87)? In any event, for the Toyota pickup to remain as competitive and as successful as it is today, a higher output engine is required.

This report is reprinted with the permission of J.D. Power and Associates, which is based in Westlake Village, CA, and specializes in automotive market research. The report was published in the January 1985 issue of The Power Newsletter. *References to future competitive actions were based on generally available industry data, releases, or past competitive practices projected in future model years.* AF

Circle 141 on Inquiry Card

Used Cars

The following are average car prices for the period ending April 10, 1985. Prices are based on wholesale activity at major dealer auctions across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically on IBM machines. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of Automotive Market Report.

Model	Zone 1	Zone 2	Zone 3
83 AMC ALLIANCE			
Sdn	3894	3833	3855
83 AMC CONCORD			
Sdn	4147	4186	4107
Sta Wgn	4378	4424	4334
83 BUICK SKYLARK			
Sdn Custom	4724	4774	4678
82 BUICK SKYLARK			
Sdn	3876	3917	3838
83 BUICK REGAL			
Sdn	6120	6181	6058
Cpe	6288	6353	6229
82 BUICK REGAL			
Turbo Cpe	5544	5600	5488
Cpe	5370	5424	5316
83 BUICK CENTURY			
Sdn Custom	6007	6066	5946
82 BUICK CENTURY			
Sdn Custom	5086	5116	5016
83 CADILLAC			
Cpe DeVille	10583	10690	10480
Sdn DeVille	10522	10629	10416
82 CADILLAC			
Cpe DeVille	8703	8788	8614
Sdn DeVille	8648	8733	8563
83 CHEVY			
Chvt Htchbk 4-Dr	2839	2870	2812
Camaro Cpe 8	6723	6790	6655
82 CHEVY			
Chvt Htchbk 4-Dr	2337	2360	2314
Camaro Cpe 8	5798	5855	5739
83 CHEVY CELEBRITY			
Sdn	5861	5816	5803
82 CHEVY CELEBRITY			
Sdn	4851	4894	4803
83 CHEVY CAVALIER			
Sdn	4697	4746	4649
82 CHEVY CAVALIER			
Sdn	3779	3817	3743
83 CHEVY CITATION			
Cpe 6	3896	3906	3839
82 CHEVY CITATION			
Cpe 6	2988	2988	2955
83 CHEVY MALIBU			
Clas Sdn	5508	5562	5454
Clas Sta Wgn	5733	5789	5675
82 CHEVY MALIBU			
Clas Sdn	4580	4605	4513
Clas Sta Wag	4756	4804	4709
83 CHEVY MONTE CARLO			
Cpe	6216	6278	6154
82 CHEVY MONTE CARLO			
Cpe	5154	5209	5100
83 CHEVY IMPALA			
Sdn	6011	6072	5952
82 CHEVY IMPALA			
Sdn	4842	4891	4796
Wgn 9	5031	5082	4980
83 CHEVY CAPRICE			
Sdn	6630	6694	6563
Sta Wag	6858	6926	6788
83 CHRYSLER			
E-Class Sdn	5806	5863	5750
82 CHRYSLER			
New Yorker Sdn	7251	7324	7179
83 DODGE OMNI			
4 Dr Cust	3708	3744	3671
82 DODGE OMNI			
4 Dr Cust	2870	2899	2840
83 DODGE ARIES			
Cpe	4329	4373	4287
82 DODGE ARIES			
Sdn	3370	3404	3337
83 DODGE DIPLOMAT			
Sln Sdn	5016	5064	4966
82 DODGE DIPLOMAT			
Sln Sdn	4035	4076	3996
83 FORD FAIRMONT			
Futura 6-Cyl Sdn 4 Dr	4164	4186	4112
82 FORD FAIRMONT			
Futura Sdn 4-Dr	3300	3334	3267
83 FORD MUSTANG			
L-Cpe 4	4667	4744	4642
82 FORD MUSTANG			
L-Cpe 4	3753	3796	3721
83 FORD LTD			
Sdn	5150	5203	5097
82 FORD LTD			
Sdn	5080	5080	4977
83 FORD ESCORT			
Htchbk 4 Dr	3826	3862	3969
83 FORD CROWN VIC			
Sdn	7569	7645	7491
82 FORD CROWN VIC			
Sdn	5954	6016	5894
83 FORD THUNDERBIRD			
Cpe	6564	6631	6700
82 FORD THUNDERBIRD			
Cpe	5191	5242	5139
83 LINCOLN CONTINENTAL			
Sdn	12523	12749	12497
Mrk VI Cpe	12754	12881	12627
82 LINCOLN CONTINENTAL			
Sdn	10443	10547	10339
Mark VI Cpe	10857	10764	10554
83 MERCURY COUGAR			
Cpe	6583	6748	6617
82 MERCURY COUGAR			
GS Cpe	3957	3995	3914
Sdn	3957	3995	3914
83 MERCURY LYNX			
HtchBk 2-Dr	3671	3607	3539
83 MERCURY MARQUIS			
Sdn	5213	5268	5163
82 MERCURY MARQUIS			
Sdn	5379	5432	5322
Wgn-2S	5545	5600	5487
83 OLDS CIERA LS			
Cpe	5922	5981	5862
Sdn	5969	6059	5963
83 OLDS CUTLASS SUPREME			
Cpe	6376	6440	6311
Sdn	6197	6262	6136
82 OLDS CUTLASS SUPREME			
Sdn	5222	5275	5171
Cpe	5429	5483	5373
83 OLDS DELTA			
Sdn	6422	6668	6766
83 PLYMOUTH HORIZON			
4 Dr Htchbk	3907	3941	3870
83 PLYMOUTH RELIANT			
Cpe	4342	4384	4297
82 PLYMOUTH RELIANT			
Cpe	3360	3393	3325
82 PONTIAC FIREBIRD			
Cpe 8	5842	5899	5783
82 PONTIAC BONNEVILLE			
Sdn 6	4996	5046	4946
83 PONTIAC 6000			
Cpe	5761	5819	5703
Sdn	5841	5899	5779
83 VOLKSWAGEN RABBIT			
2 Dr Htchbk	4428	4472	4384
82 VOLKSWAGEN RABBIT			
2-Dr Htchbk	3427	3461	3393
83 DATSUN			
Sentra 2 Dr Std Sdn	3998	4038	3957
Stanza Hbk 4 Dr Dlx	5405	5459	5351
82 DATSUN			
210 Std 2 Dr	3002	3032	2972
Sentra 2 Dr	3292	3325	3259
Stanza Hbk 4 Dr Dlx	4304	4347	4261
83 TOYOTA			
Corolla Sedan 2 Dr	4748	4796	4700
Celica St	6792	6860	6724
Camry	7568	7672	7539
82 TOYOTA			
Corolla 2 Dr Sdn	3919	3958	3880
Celica St Cpe	5516	5571	5461
Corona Sdn Lux	5383	5438	5329